

## **Design and produce complex text documents**

This workbook supports BSBTEC401 Design and produce complex text documents in the Business Services Training Package.

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# BSBTEC401 Design and produce complex text documents

## Application

This unit describes the skills and knowledge required to design and develop business documents using complex technical features of word processing software.

The unit applies to those who work in a range of business environments and have skills which may be applied in the provision of administrative support within an enterprise or by technical experts responsible for producing their own word-processed documents.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

## Elements and Performance Criteria

<b>Element</b> Elements describe the essential outcomes.	<b>Performance Criteria</b> Performance criteria describe the performance needed to demonstrate achievement of the element.	<b>Page reference</b>
1. Prepare to produce word processed documents	1.1 Identify ergonomics requirements and organise personal work environment	9–13
	1.2 Use safe work practices to ensure ergonomic, energy and resource conservation requirements are met	9–18
	1.3 Identify document purpose, audience and presentation requirements, and clarify with relevant stakeholders, where required	19, 27
	1.4 Identify organisational requirements for text-based business documents to ensure consistency of style and image	21–22, 27–28
	1.5 Evaluate complex technical functions of software for usefulness in fulfilling requirements of the task	103–260
2. Design complex documents	2.1 Design document structure and layout according to purpose, audience and information requirements of task	33–260
	2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	27–28, 40–41, 72–73, 77–108, 89–114, 182–193
	2.3 Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout	103–260
	2.4 Use help function to overcome problems with document design and production	48
3. Add complex tables and other data	3.1 Insert a table into document, change cells according to information requirements	89–121
	3.2 Format rows and columns, where required	89–121
	3.3 Insert images and other data and format, where required	57–75, 140–145, 246–247

<b>Element</b> Elements describe the essential outcomes.	<b>Performance Criteria</b> Performance criteria describe the performance needed to demonstrate achievement of the element.	<b>Page reference</b>
4. Produce documents	4.1 Develop documents, and achieve required results	Throughout workbook
	4.2 Preview, adjust and publish documents according to organisational and task requirements	89, 134, 151, 156
	4.3 Name and store documents in accordance with organisational requirements and exit application	23, 33–35, 41
	4.4 Prepare document according to organisational requirements, policies and procedures	25, 170–177

## Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

<b>Skill</b>	<b>Description</b>	<b>Page reference</b>
Reading	<ul style="list-style-type: none"> <li>Recognises and interprets textual information from a range of resources to determine and confirm requirements and to assist with document issues</li> </ul>	Throughout workbook
Writing	<ul style="list-style-type: none"> <li>Develops material using required format and incorporating technical functions to meet business needs</li> </ul>	Throughout workbook
Self-management	<ul style="list-style-type: none"> <li>Recognises and follows explicit and implicit protocols and meets expectations associated with own role</li> </ul>	9–11, 23–24
Teamwork	<ul style="list-style-type: none"> <li>Collaborates with others to achieve joint outcomes</li> </ul>	20–22
Planning and organising	<ul style="list-style-type: none"> <li>Applies formal processes when planning complex tasks, producing plans with logically sequenced steps</li> </ul>	27, 115–119

## Assessment for this Unit

This Unit is assessed by:

- creating a newsletter
- creating a letterhead template
- using Help
- creating a form template
- creating a form
- creating a flyer.

## Assessment Requirements

### Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare design and produce at least four complex text documents.

In the course of the above, the candidate must:	Page reference
<ul style="list-style-type: none"> <li>• follow organisational and safe work practices</li> </ul>	9–18
<ul style="list-style-type: none"> <li>• adhere to organisational requirements for:               <ul style="list-style-type: none"> <li>• producing documents within designated timelines</li> </ul> </li> </ul>	24
<ul style="list-style-type: none"> <li>• naming and storing documents</li> </ul>	23, 33–35
<ul style="list-style-type: none"> <li>• adhere to task requirements when producing complex documents including:               <ul style="list-style-type: none"> <li>• using appropriate styles and layout consistently throughout the document</li> </ul> </li> </ul>	21, 27–28, 170–193
<ul style="list-style-type: none"> <li>• using correct formatting and document structure</li> </ul>	170–193
<ul style="list-style-type: none"> <li>• use the following features:               <ul style="list-style-type: none"> <li>• mail merge</li> </ul> </li> </ul>	146–168
<ul style="list-style-type: none"> <li>• document styles</li> </ul>	182–193
<ul style="list-style-type: none"> <li>• references (footnotes/endnotes)</li> </ul>	235–240
<ul style="list-style-type: none"> <li>• table of contents</li> </ul>	217–222
<ul style="list-style-type: none"> <li>• paragraph</li> </ul>	40
<ul style="list-style-type: none"> <li>• line spacing</li> </ul>	38
<ul style="list-style-type: none"> <li>• section breaks</li> </ul>	196–199
<ul style="list-style-type: none"> <li>• alternating headers</li> </ul>	194, 198–199
<ul style="list-style-type: none"> <li>• footers</li> </ul>	194
<ul style="list-style-type: none"> <li>• resolve issues by referring to user documentation and online help</li> </ul>	48
<ul style="list-style-type: none"> <li>• apply knowledge of complex operation and functions of industry software applications.</li> </ul>	103–260

### Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:	Page reference
<ul style="list-style-type: none"> <li>• formatting styles and their effect on formatting, readability and appearance of documents</li> </ul>	27–28, 40–41, 72–73, 77–108, 89–114, 182–193
<ul style="list-style-type: none"> <li>• organisational requirements for ergonomics, work periods and breaks, and conservation techniques</li> </ul>	9–18
<ul style="list-style-type: none"> <li>• purpose and contents of an organisational style guide</li> </ul>	21–22
<ul style="list-style-type: none"> <li>• key aspects of organisational policies and procedures.</li> </ul>	9–11, 23–24

# How to use this workbook

## Recommended order of learning

Before attempting this workbook, it is recommended that you have completed:

- Write complex documents

or similar. If you do not have knowledge of standard business documents, speak to your trainer.

## Spelling and grammar in this workbook


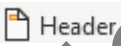
At times different spellings of one word are used in this workbook.

References to buttons, groups, tabs and other features are spelt the same way as they appear in the application so instructions resemble the application as closely as possible.

In all other instances Australian spelling is followed, e.g. the Font Color button is used to change the colour of selected text.

## Images used in this book

Your monitor size and resolution will determine how your version of Word will display. There will be variation in the number of buttons shown on the Ribbon and the format of some buttons, e.g.:

- on a bigger screen the Header button displays as 
- on a smaller screen it displays as 



To avoid eyestrain Microsoft applications use soft images for components such as buttons, Ribbons and dialog boxes. Screenshots have been enhanced in this workbook as much as possible, however sometimes they may still appear out of focus.

## Microsoft applications

Microsoft applications (apps) come in two versions:

- Microsoft 365 subscription.
- one-time purchase Office Professional.

The images for this workbook have been taken from Word 365. The workbook is fully compatible with Professional, however some images will display differently, e.g.:

- in Word 365 the New button displays as 
- in Word Professional the button displays as 

Where the two versions differ significantly, instructions are provided for both.

## Shortcut key combinations

Shortcut key combinations are shown in the left margins of this book, e.g. where using the Open button is instructed in the text, the shortcut key combination is included:

Ctrl O

To use the shortcut key combination press and hold down the keys in the order given, i.e. hold down the Ctrl key then press the O key.

## Style guides

Most organisations will have instructions for how documents should be formatted. These instructions may be detailed in a style guide. The organisational style guide is sometimes referred to as a **house style guide**. Style guides include details of:

- use of company logos
- set headers and footers that need to be added to all documents
- company colour schemes to be used
- use of specific fonts
- use of templates
- use of language and technical terms.

Large organisations will have a detailed style guide with instructions for what font to use when writing a letter to how a company logo can and cannot be used.

Small business may just have a word processing template containing a logo and a set text style to represent a letterhead.

## Style guide for exercises in this workbook

For exercises in this workbook you will be using the Word default style guide.

Word defaults are the settings which are in-built when the app is installed on a device providing a suggested standard for business documents.

### Word default style guide

#### Layout

Page size	Set to the Australian standard A4 (the USA are standard paper page size is called Letter)
Margins	2.54 cm – the metric equivalent of 1 inch


#### Text styles

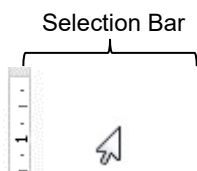
Body text (Normal style)	Calibri, 11 pt, black, left aligned text, 8 pt spacing after each paragraph
Heading 1 style – for document headings	Calibri Light, 16 pt, blue, 12 pt paragraph spacing above
Heading 2 style	Calibri Light, 13 pt, blue, 2 pt paragraph spacing above
Heading 3 style	Calibri Light, 12 pt, blue, 2 pt paragraph spacing above
Bulleted paragraphs	Black circle bullet indented 0.63 cm from the left margin with text indented 0.63 cm from the bullet
Numbered paragraphs	Arabic number followed by a full stop at left margin
Header/footer text	Calibri, 11 pt, black

The default settings for Word may have been altered on your device in your training organisation. In this case use your training organisation's default settings when completing exercises.

## Selecting text

Selecting text (also called highlighting) is used to define text that you wish to do something to – delete, move, copy, change the font, size, etc. The most commonly used method of selecting text is to hold down the left mouse button and drag across and/or down the text.

When the insertion point is moved into the Selection Bar area on the left of your document it will display as a right-pointing arrow . By dragging up or down in this area you can select lines of text quickly.



The area to the left of your text is called the Selection Bar. When you move your mouse into the Selection Bar it changes to a mouse pointer. Quick selection movements can be made using the Selection Bar by simply clicking and dragging.

Text can also be selected by using the methods described below.

### Selecting text using the mouse

A character	Click and drag across a character.
A word	Double click in a word.
A sentence	Ctrl click anywhere in a sentence.
A line	Move the mouse pointer into the Selection Bar and click.
A paragraph	Move the mouse pointer into the Selection Bar. Point to the paragraph and double click. OR Triple click in the actual paragraph.
To select text between two points	Click at the beginning of the text to be selected. Move the insertion point to the end of the text. Hold down the Shift key and click.
Random selections	Hold down the Ctrl key and select each group of text.
To select the whole document	Press Ctrl A. OR Triple click in the Selection Bar.

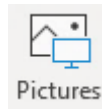
If text is selected and you press a key on the keyboard the text will be overwritten or deleted.

## Inserting images

All image formats can be inserted into a Word document, e.g. jpg, bmp, tiff. When using images in documents which have not been created inside your organisation, follow organisational policies and procedures for copyright and/or ask your workplace supervisor for permission.

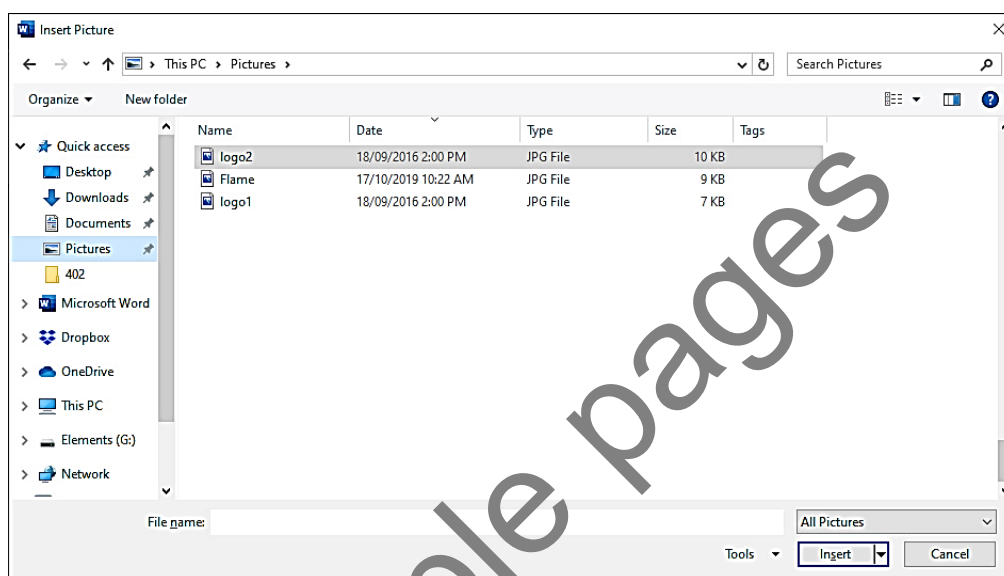
### Exercise 18

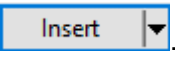
1. Open the file **Barrier Reef** from the *978-1-921971-64-8 BSBTEC401 exercise files* folder.

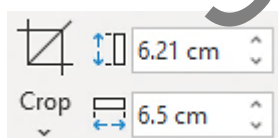


2. From the Insert Ribbon click on the Pictures button

The Insert Picture dialog box will display.



3. Navigate to the *978-1-921971-64-8 BSBTEC401 exercise files* folder.
4. Select the image file **Bout** and click on .
5. Check the Picture Format Ribbon is displayed.
6. From the Size Group reduce the *Width*: to 6.5 cm. The height of the image will automatically reduce.

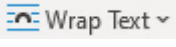



7. Save As the document in your working folder following workbook procedures and leave it open for the next exercise.

## Text wrapping

Text wrapping controls how text flows around an image.

### Exercise 19

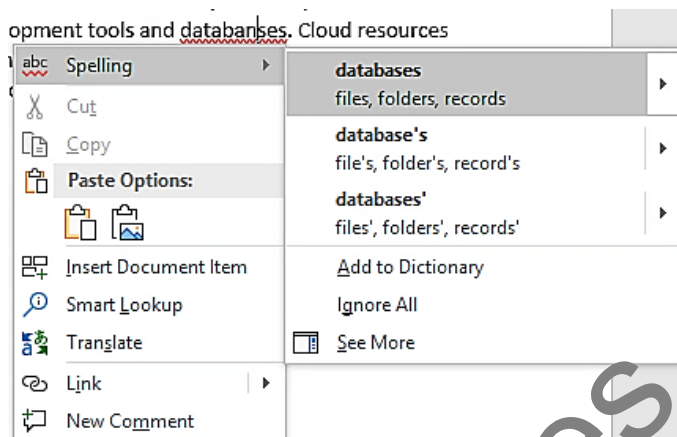
1. Using **Exercise 18...** check the picture is selected.
2. Click on the Wrap Text button  on the Picture Tools Format Ribbon and select  **Square**. The text will wrap around the picture.
3. Position the image to the right of the top three paragraphs of text.



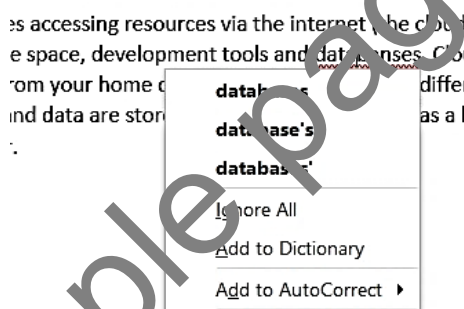
## Spelling and grammar

When text is typed, Word automatically checks the document for any spelling or grammar mistakes. A red wiggly line indicates spelling errors and a blue wiggly line indicates grammatical errors.

Move the mouse onto the word containing the error and click the right mouse button. A shortcut menu will display.



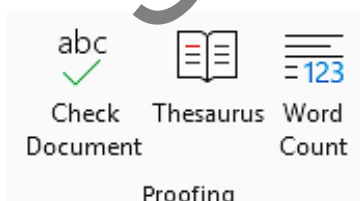
If you are using Word Professional, the shortcut menu displays as follows.



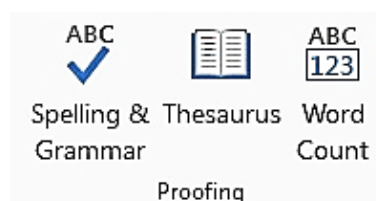
Click on the correct word on the shortcut menu. This will replace the incorrect word in the document. The red wiggly line will disappear.

## Proofing tools

Proofing tools are located in the Proofing Group in the Review Ribbon.



Word 365



Word Professional


The Check Document/Spelling & Grammar tools check for a range of issues including:

- spelling errors
- punctuation errors, e.g. incorrect spacing
- grammatical errors, e.g. 'a' before a vowel rather than 'an'.

### Note

Sometimes Word indicates correct Australian spelling as errors and offers US spelling even when the dictionary is set to English (Australia), e.g. customise → customize, licence → license. If you are not sure which spelling is correct, refer to the Macquarie dictionary.

## Multilevel lists

The Multilevel List button  is used for inserting bullets and/or numbers at different levels. A number of predefined outline styles are available or you can define your own. Levels are indicated by indents

### Exercise 50

Create the following document using the instructions in this exercise.


## Word revision

In a new document type answers to the following questions, which relate to features you have learnt so far in Word.

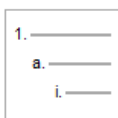
- 1) Every document created in Word has a template attached to it:
  - a) What is this template called?
  - b) Define the term 'template'.
- 2) The Font dialog box can be accessed from the Home Ribbon, from the right mouse button or by pressing Ctrl D.

Answer the following questions regarding fonts:

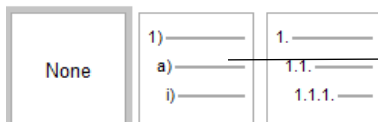
- a) How do you display the mini toolbar?
  - b) How do you display hidden text?
  - c) How do you copy font formatting using the Format Painter?
- 3) Ctrl T will indent to the first tab stop. Describe other ways you can indent text in Word.

1. Create a new document. Retain default line and paragraph spacing.
2. Type the heading and the first paragraph, then Press Enter.
3. Click on .
4. Click on the numbering option shown below.

Current List





List Library



Click on this option to select

The first number will be inserted into the document.

5. Type the first numbered paragraph then press Enter.
6. To demote the numbering (to level two) click on the Increase Indent button .
7. Type paragraphs as shown for a) and b) on the previous page. Press Enter after each paragraph.
8. To promote the numbering (back to level one) click on the Decrease Indent button .

# Previewing a file

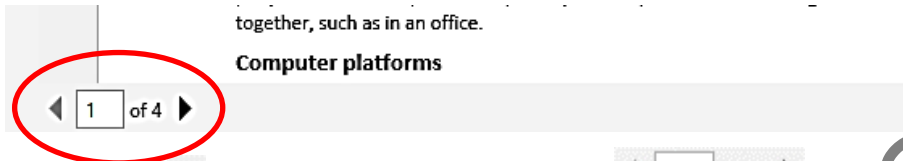
Previewing a file displays the finished document. If you need to print a document, using preview before printing reduces paper wastage.

To preview a finished document you need to enter Backstage view.

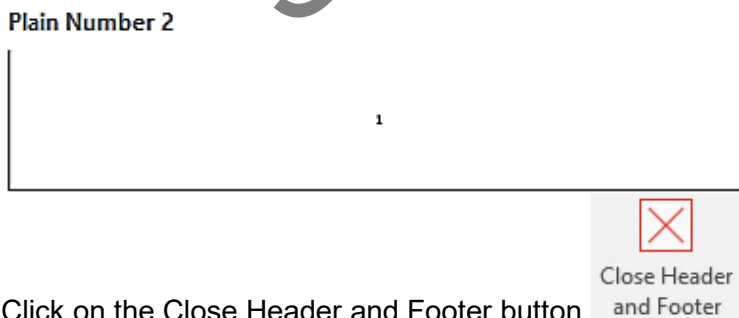
## Exercise 76

1. Open the file **Computers** from the *978-1-921971-64-8 BSBTEC401 exercise files* folder.
2. Save As the document in your working folder following workbook procedures.
3. Click on **File** then select **Print**.

A preview of the document is in the right pane. Navigation buttons display below the preview.



4. Click on the **Next** of the page navigation buttons **1 of 4** three times to display page 4.
5. Click on **Page Setup** to display the Page Setup dialog box.
6. Change Top, Bottom, Left and Right margins to 2 cm and click on OK. The document will now fit over three pages.
7. Click on **Previous** twice to return to page 1.
8. Click on the **Zoom** of the Zoom 76% and drag to the right to zoom into the current page.
9. Click on the **Zoom to Page** button to display the whole page.
10. Click on **Back** to exit Backstage view.
11. On the Insert Ribbon, click on **Page Number**. Position the mouse pointer over **Bottom of Page** and Select Plain Number 2.



12. Click on the Close Header and Footer button.
13. Save and close the document.

# Evidence guide

## Elements and Performance Criteria

<b>Element</b> Elements describe the essential outcomes.	<b>Performance Criteria</b> Performance criteria describe the performance needed to demonstrate achievement of the element.	<b>Assessment task</b>
1. Prepare to produce word processed documents	1.1 Identify ergonomics requirements and organise personal work environment	Task 1
	1.2 Use safe work practices to ensure ergonomic, energy and resource conservation requirements are met	Task 1
	1.3 Identify document purpose, audience and presentation requirements, and clarify with relevant stakeholders, where required	Task 3
	1.4 Identify organisational requirements for text-based business documents to ensure consistency of style and image	Task 3
	1.5 Evaluate complex technical functions of software for usefulness in fulfilling requirements of the task	Task 2, Task 3, Task 4, Task 5, Task 6
2. Design complex documents	2.1 Design document structure and layout according to purpose, audience and information requirements of task	Task 3, Task 4, Task 5, Task 6
	2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	Task 3, Task 4, Task 5, Task 6
	2.3 Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout	Task 3, Task 4, Task 5, Task 6
	2.4 Use help function to overcome problems with document design and production	Task 2, Task 3
3. Add complex tables and other data	3.1 Insert a table into document, change cells according to information requirements	Task 5
	3.2 Format rows and columns, where required	Task 5
	3.3 Insert images and other data and format, where required	Task 3, Task 4, Task 6
4. Produce documents	4.1 Develop documents, and achieve required results	Task 3, Task 4, Task 5, Task 6
	4.2 Preview, adjust and publish documents according to organisational and task requirements	Task 3, Task 4, Task 5, Task 6
	4.3 Name and store documents in accordance with organisational requirements and exit application	Task 3, Task 4, Task 5, Task 6
	4.4 Prepare document according to organisational requirements, policies and procedures	Task 3, Task 4, Task 5, Task 6

## Assessment Requirements

### Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- prepare design and produce at least four complex text documents.

In the course of the above, the candidate must:	Assessment task
<ul style="list-style-type: none"> <li>• follow organisational and safe work practices</li> </ul>	Task 1
<ul style="list-style-type: none"> <li>• adhere to organisational requirements for:               <ul style="list-style-type: none"> <li>• producing documents within designated timelines</li> </ul> </li> </ul>	Task 3, Task 4, Task 5, Task 6
<ul style="list-style-type: none"> <li>• naming and storing documents</li> </ul>	Task 3, Task 4, Task 5, Task 6
<ul style="list-style-type: none"> <li>• adhere to task requirements when producing complex documents including:               <ul style="list-style-type: none"> <li>• using appropriate styles and layout consistently throughout the document</li> </ul> </li> </ul>	Task 3, Task 4, Task 5, Task 6
<ul style="list-style-type: none"> <li>• using correct formatting and document structure</li> </ul>	Task 3, Task 4, Task 5, Task 6
<ul style="list-style-type: none"> <li>• use the following features:               <ul style="list-style-type: none"> <li>• mail merge</li> </ul> </li> </ul>	Task 4
<ul style="list-style-type: none"> <li>• document styles</li> </ul>	Task 3, Task 4, Task 5, Task 6
<ul style="list-style-type: none"> <li>• references (footnotes/endnotes)</li> </ul>	Task 3
<ul style="list-style-type: none"> <li>• table of contents</li> </ul>	Task 3
<ul style="list-style-type: none"> <li>• paragraph</li> </ul>	Task 3, Task 4, Task 5, Task 6
<ul style="list-style-type: none"> <li>• line spacing</li> </ul>	Task 3, Task 4, Task 5, Task 6
<ul style="list-style-type: none"> <li>• section breaks</li> </ul>	Task 3
<ul style="list-style-type: none"> <li>• alternating headers</li> </ul>	Task 3
<ul style="list-style-type: none"> <li>• footers</li> </ul>	Task 3
<ul style="list-style-type: none"> <li>• resolve issues by referring to user documentation and online help</li> </ul>	Task 2, Task 3
<ul style="list-style-type: none"> <li>• apply knowledge of complex operation and functions of industry software applications</li> </ul>	Task 2, Task 3, Task 4, Task 5, Task 6

### Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:	Assessment task
<ul style="list-style-type: none"> <li>• formatting styles and their effect on formatting, readability and appearance of documents</li> </ul>	Task 3, Task 4, Task 5, Task 6
<ul style="list-style-type: none"> <li>• organisational requirements for ergonomics, work periods and breaks, and conservation techniques</li> </ul>	Task 1
<ul style="list-style-type: none"> <li>• purpose and contents of an organisational style guide</li> </ul>	Task 3, Task 4, Task 5, Task 6
<ul style="list-style-type: none"> <li>• key aspects of organisational policies and procedures.</li> </ul>	Task 1, Task 3, Task 4, Task 5, Task 6